Service Point Workflow Manual - SSVF

Introduction

This guide was created to assist users with the correct workflow process of entering data into Service Point for Baltimore County. All users must follow the exact order of these procedures, or else the data will not report properly. This resource was created with the understanding that the users reading this guide already have basic knowledge of Service Point.

Technical Support

Please contact Jason Burns for technical assistance, trainings, custom reports, custom assessments, etc.

Phone: 443-208-1020 (Do not leave voicemails. If unavailable by phone, please email.)

Email: jburns@baltimorecountymd.gov

Service Point Login Web Address (Live Site)

https://www4.servicept.com/baltimoreco

Service Point Login Web Address (Training Site)

http://www4.servicept.com/training/baltimoreco

HMIS Resources Web Address

Visit the Baltimore County HMIS website to obtain up to date HMIS information, forms, manuals, and data accuracy scores! http://www.baltimorecountymd.gov/hmis

Remember the following order for data entry:

- 1. SEARCH
- 2. COMPLETE INTAKE FORM (Back Date First!!!)
- 3. **HOUSEHOLD** (if applicable)
- 4. ROI
- 5. ENTRY DATE & ENTRY TYPE (VA)
- 6. SERVICE TRANSACTIONS (Click on Multiple Services)
- 7. EXIT DATE (Update Intake Form First!!!)

MAKE SURE YOU ARE ENTERING DATA AS THE CORRECT VA PROGRAM BEFORE YOU BEGIN DATA ENTRY!!!

1. SEARCH - Search for your client in ClientPoint to make sure your client is not already in the system. Search by First and Last Name only. If no matches are found, fill out the First Name, Last Name, and SS# only to create a new client.

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earch for Existing Client
earch for client before adding a new client.
rst MI Last Suffix
S#
earch Filter 🔲 Exact Match?
Search only active clients?
Search only inactive/deleted clients?
Search all clients?
Search For Client

Note: For clients with names that may be shortened or extended, search **ALL** possibilities. For example, if your client's name is "Bill Smith," search for "Bill Smith," "Will Smith," etc.

2. BALTIMORE COUNTY UNIVERSAL INTAKE FORM - Once on the Profile page in Client Point, complete the Baltimore County Universal Intake Form. All of the questions in BOLD RED are required to have an answer. *BACK DATE FIRST!!!

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Baltimore County	/ Universal Intake Form 🖴	
		Save Changes
Assessment Date	02/10/2009 09 🕶 : 00 🕶 AM 🕶 Back Date	
Have Valid Drivers License or State ID?	No ₩ H G	
ID#	d-654-832-176 H G	
Date of Birth	01/01/1977 (mm/dd/yyyy) H G	
Date of Birth Type	Full DOB Reported (HUD) W H G	
Primary Race	White (HUD)	

Note: Even though some of the questions in **BOLD RED** may not pertain to your client (e.g., pregnancy, military, etc.), an answer is still required. If questions that are **not** in **BOLD RED are** relevant to your client, these questions must be also be answered. For example, if your client is homeless, all of the homeless questions must be filled out. If you are working with a client that already has this intake form filled out, be sure to review all questions and make necessary updates.

"Housing Status" field *must* be answered in the Baltimore County Universal Intake Form!

Residence Prior to Program Entry			
Housing Status - Select - H G			
If "Don't Know" or "Refused" are selected as the Housing Status response, the client will not be reported in the report.			

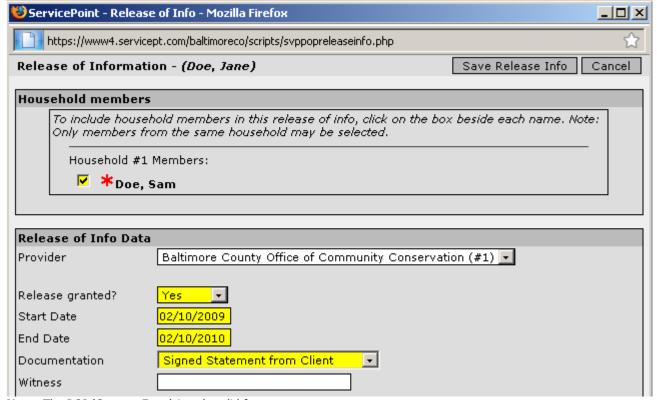
3. HOUSEHOLD INFORMATION - Complete the Household Information at the top of the Profile page, if applicable. **DO NOT COMPLETE THIS SECTION IF YOUR CLIENT IS SINGLE WITHOUT CHILDREN!!!** The system automatically assumes your client is single if the Household Information is not completed.

<u> Household Information - O Households - Click to Expand</u>

When creating a household, you **MUST** use "Household Data Sharing."



4. ROI - Complete the ROI. If applicable, you may complete the ROI for family members at the same time.



Note: The ROI (Consent Form) is only valid for one year.

5. ENTRY/EXIT - Add an Entry Date. If applicable, you may complete the Entry Date for family members at the same time. The "Type" of Entry should always be changed to "VA."

Entry/Exit - (B	urns, Jason)	Save and Close Save Cancel
Household Dat	a Sharing 🖴	Add Household Data
Household mer	nbers	
	household members in this entry/exit, click on the box beside each nathousehold may be selected. Household #1 Members: **Burns, Ben	me. Note: Only members from
Entry Data		
Provider	ServicePoint Training Site (#1) ▼	
Туре	VA V	
Entry Date	02/10/2009 🔻 : 🔻	

6. SERVICE TRANSACTIONS – Click on "Multiple Services". If applicable, you may complete the Service Transaction for family members at the same time. Only the fields in yellow need to be completed.

Services	
	Add Another Cancel All Clear All Save And Exit Exit
Household members	
To include household members in these service from the same household may be selected.	ces, click on the box beside each name. Note: Only members
Household #1 Members:	
▼ *Doe, Sam	
Multiple Services	
-	r before entering data in the Service List below. If you
	make adjustments for the new provider's Service List
defaults. Any data that is currently in the Serv	vice List will be removed and will need to be reentered.
defaults. Any data that is currently in the Serv	vice List will be removed and will need to be reentered.
	partment of Social Services: Ex-Offender Housing (#6175)
Provider Baltimore County De	partment of Social Services: Ex-Offender Housing (#6175)
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Provider Baltimore County De Service List # of Services 1 Service Rent Payment As	partment of Social Services: Ex-Offender Housing (#6175) ssistance End Date 02/10/2009 10 : 34 AM
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Note: You may only select from the dropdown list from either "HPRP Housing Relocation & Stabilization Service Provided" or "HPRP Financial Assistance Type," not both. You will know which one to select based on the selection from the "Service" dropdown menu.

7. Entry/Exit – Add an Exit Date. If applicable, you may complete the Exit Date for family members at the same time. *UPDATE INTAKE FORM FIRST!!!

